

Credential Financial Inc. (**Credential**) is a national wealth management firm providing MFDA and IIROC dealer services, online brokerage, and insurance solutions to over 225 organizations and more than 1,300 advisors. Our mission is to empower positive growth through wealth management leadership, valued advice, and outstanding service—for our partners, for their people, and for ours.

We currently have a need for a **Client Solutions Officer** in our Partner & Client Care department.

The Client Solutions Officer (CSO) is a member of Credential's dynamic Call Center Team. They are primarily responsible for providing information by phone or email to credit union representatives, investors and dealers regarding a wide range of Credential products, services, policies, procedures and systems. It is expected that the CSO will have, or work towards attaining, a basic working knowledge of Mutual Funds and Securities and that they are adept at providing positive client experiences through high quality service and communication.

Expected Contributions:

- Handle telephone enquiries on transaction processing activities for assigned telephone queues
- Process transfer requests and address incoming emails for multiple business lines
- Achieve a basic working knowledge on Credential's mutual funds, securities and insurance platforms products, services, policies, procedures and systems
- Use the OSM (Call-Tracking) System to receive and review requests for account adjustments relating to our mutual funds, securities and insurance platforms and communicate with representatives to obtain complete documentation
- Resolve concerns with customer accounts, forwarding complaints and errors to the appropriate department
- Identify and report problems, escalating issues when necessary
- Follow up on transfer-in requests in progress with fund companies and other financial institutions
- Communicate with credit union representatives and external financial institutions on delayed/rejected transfer-in requests
- Maintain current knowledge on market trends and news items that may impact Credential's products and those offered through our mutual funds, securities and insurance platforms
- Provide client focused service through friendly, clear communication and the ability to understand the caller's needs.
- Maintain service delivery skills through regular call review discussions

Experience and Skills Required:

- 1 years' customer service experience required
- High School Diploma or Equivalency
- Experience in a call center is an asset
- Previous credit union experience an asset
- Intermediate level of knowledge with MS Office Suite
- Excellent verbal and written communication skills are essential, both at an individual and group level
- Fluency in English required, bilingual French language skills an asset
- Ability to work independently and in a team to ensure problems are identified and resolved efficiently
- Strong attention to detail, organizational and time management skills
- Excellent customer service orientation
- Strong analytical and problem solving skills
- Ability to handle difficult client situations, ultimately ensuring resolution of the problem
- Ability to work well under pressure in a fast-paced environment
- Must be available to work varied shifts Monday to Friday, 6:00 am to 5:00 pm

*A career with Credential means being part of an organization dedicated to your success. It means belonging to a group of talented individuals who live our values—partnership, innovation and community—every day. Our amazing people and dynamic culture and an exceptional rewards and benefits package are the essence of what sets Credential apart. Visit our website at **credential.com** to learn more.*